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Israel

HRI Food Service Sector

Sector Report

2007

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Report Highlights:

Israel's HRI sector is complex and very diverse, with large commercial and institutional components. While the tourist industry experienced a slight downturn in 2006, Israel possesses a strong tourist industry, which will continue to fuel demand from hotels and restaurants. Understanding import regulations and distribution channels, as well as making local contacts, are essential to entering this market. Nuts, salmon, and dairy products are among the U.S. products having good prospects in this market.

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I. MARKET SUMMARY

The HRI market is very complex and diverse. Food service is divided into two categories: commercial and institutional. The commercial sector is divided into sub-sectors: hotels and restaurants. The commercial sector comprises an estimated 360 hotels (46,500 rooms), 1,174 rural tourism houses, 4,399 food business (restaurants, coffee shops, fast food, pubs and bars), of which 1,539 (35 percent) are kosher certified. Some of the restaurants that aren't kosher certified still use only kosher ingredients. In addition, there are about 900 banquet halls. The most popular food business are, coffee shops, Mediterranean, Italian, Thai and Japanese restaurants. In 2006, sales of the restaurants, coffee shops, kiosks pubs and bars were estimated at \$2.6 billion. Approximately 45 and 23 percent of the bars and pubs respectively, are located in central and northern Israel. Approximately 1,600 restaurants, coffee shops, pubs and bars are located in Tel Aviv. It is estimated that in 2006 approximately 837,654 Israelis visited restaurants daily, spending an average of \$8.70 per meal.

In 2006, 1.8 million tourists visited Israel, a 4.5 percent decrease compared to the previous year. The decrease was as a result of the July-August conflict with Lebanon. Tourism to the northern part of Israel was affected by the war as was the image of the state of Israel (see chart 1). Between January and June, 2006 entries to Israel rose by 22 percent compared to the same period, one year ago; however, from July through December, 2006, entries dropped 27 percent compared to the same period in 2005. In 2006, income from tourism totaled \$2.45 billion, a two percent decrease compared to the previous year. The share of tourism in GDP is about two percent. Out of the total tourist entries in 2006, 27.4 percent were from the U.S., 14 percent from France, 9 percent from Great Britain, and the rest were from Germany, Russia, Italy and Scandinavia, respectively. Overnight stays in 2006 totaled 19.3 million, a one percent increase from 2005. Out of total overnight stays, 6.8 million (35 percent) overnight stays were by foreign tourists while 12.5 million were Israeli. Average tourist stay in 2006 totaled nine days.

Some analysts suggest tourist arrivals can reach 4-5 million by 2009 with improvements in long-term marketing, infrastructure, attracting investors, and adopting a more liberal aviation policy.

The institutional food service companies include approximately 4,000 kitchens. The Israeli Defense Forces (IDF) is the largest institutional food consumer. The IDF alone consumes about 4 percent of all Israeli food through its purchasing channels. Currently the IDF is in the process of outsourcing its food supply chain (150,000 meals/day). The Israeli police force will join the IDF as a consumer adding another 31,000 meals/day.

In CY 2006, the value of the food processing industry, including beverages, beer and tobacco, was estimated at \$10.7 billion, a 2.9 percent increase compared to the previous year (from \$10.4 billion to \$10.7 billion). The expected growth rate in the next few years is of about 2-5 percent annually. The HRI market, including the army, hospitals, hotels, restaurants and other places of employment, occupies 30 percent (\$3.2 billion) of the total. Over 50 percent of the total food supply directed at non-institutional consumers is sold through supermarkets and retail chains. Two major supermarket chains with hundreds of outlets throughout the country dominate the retail food market.

The monthly household expenditure in 2005 totaled \$2,403, of which 16.3 percent (\$392) was directed to food purchases and consumption. When buying food, Israelis are quality oriented and are ready to pay a premium for quality food products. Consumers are acquainted with American products and wish to have more of them available. During the last

decade, an increasing share of consumers prefer to buy their products through supermarket chains compared to the traditional channels of open markets and small grocery stores.

Table 1: Type and number of food service establishment in Israel in 2006

Type of Establishment	Number of Establishments
Hotels	
Hotels	330 (127,190 beds)
Youth hostels	29 (6,163 beds)
Rural Tourism	1,174 (26,148 beds)
Grand Total Beds	159,501
Food Business	
Restaurants	2,500
Celebration Halls	900
Coffee Shops	1,449
Institutional Contracts	
Company Cafeterias	1,750
Schools and Universities	1,500
Kibbutz kitchens, elderly Homes	760
Hospitals and Prisons	225

Source: CBS, Israel

Chart 1: Tourist Arrivals to Israel, thousand per month



Source: Israeli Ministry of Finance

Trade and the Market for U.S. Food Products

Israel is a net food importer. In 2006, food and beverages exports totaled \$686 million, while imports totaled \$1.18 billion. The EU and U.S. are the main trading partners. Other main suppliers of food include Turkey, Thailand and China. South American countries such as Brazil, Argentina and Uruguay mainly export kosher meat to Israel.

Palestinian Authority: American exporters should be aware of the cultural, economic and commercial nuances for sales bound for the Palestinian market. FAS encourage American exporters wishing to market their goods in the West Bank & Gaza to strongly consider using local Palestinian agents and distributors. In addition, Israel has the potential to be a “bridge” to the Palestinian Authority with its rapidly growing population.

Table 2: Opportunities and Challenges for U.S. Exporters to Israel

Opportunities	Challenges
The current exchange rate between the U.S. dollar and the euro continues to favor U.S. suppliers, as European products become more expensive.	Growing competition exists from Eastern Europe, Turkey, Former Soviet Union, South America and the Far East. Products from those areas are cheaper than products from the U.S. and EU and the quality is steadily improving.
4-5 million tourists are expected to visit Israel by 2009.	Religious restrictions on food ingredients, eg: non-kosher meat, poultry and pork. Hotels and the institutional sector, refuse to carry non-kosher food products.
Improved agricultural trade agreement between the U.S. and Israel.	U.S. products need to cater to the Middle Eastern taste.
There is tremendous growth in the number of food stores (supermarkets, grocery stores, 24-hour convenience stores), and restaurants.	Local tourism is hurt by the political/security situation.
The Israeli consumer appreciates American products and they are in demand.	U.S. exporters lack knowledge of the Israeli market and are unaware of new opportunities.
Israel has the potential to be a “bridge” to the Palestinian Authority with its rapidly growing population.	Local HRI sector is not familiar enough with U.S. suppliers and products.
	High shipping costs
	Israeli food standards and labeling requirements are in many cases different from those in the U.S.

Ability of U.S. Exporters to Meet Market Requirements

Kosher: Israel law requires that the Rabbinical Council of the Chief Rabbinate or a body authorized by the Council certify all meat and poultry imports as being kosher. This policy presents significant challenges for U.S. food exporters. Kosher certification is not a legal requirement for importing food into Israel (excluding meat and poultry). However, non-kosher products have a much smaller market as the large supermarket chains, hotels and institutional food services refuse to carry them. About 2/3 of consumers buy kosher food products. Manufacturers who produce kosher products must be able to satisfy Israeli rabbinical supervisors that all ingredients and processes are kosher. According to the Law for Prevention of Fraud in Kashrut, only the Chief Rabbinate of Israel is authorized to determine

and approve a product as kosher for consumption in Israel; the Chief Rabbinate may authorize another supervisory body to act in its name. Here too, U.S. products have an advantage as Israel's Chief Rabbinate recognizes the kashrut certification issued by many American rabbis. It is, however, quite simple for Israeli importers to send an Israeli rabbi to any supply source, thereby reducing the American advantage.

Food Standards and Labeling Requirements: In many cases Israeli food standards and labeling requirements are different from those in the U.S. and are more similar to the EU standards. The Food Control Service (FCS), with the Ministry of Health, strictly enforces food regulations in the Israeli ports. Therefore, exporters intending to export to the Israeli market must be familiar with Israeli regulations and adjust to the requirements.

Section II: Road Map For Market Entry

A. Entry Strategy

U.S. suppliers/exporters should focus on establishing business relationships with a reliable and efficient importer, and/or a commissioned agent and distributor and identify the appropriate distribution and sales channels. Visits by U.S. exporters/manufacturers/investors to explore opportunities firsthand, and to meet with Israeli importers/investors would strengthen confidence with local partners. Visiting local HRI shows/exhibitions would be a way to quickly obtain a broad overview of the sector and to meet a broad network of contacts.

Large HRI firms have their own purchasing/importing division to handle food imports directly. U.S. suppliers should initially contact the purchasing/importing divisions of these large hotel/restaurants chains. A listing of contacts for Israel's major hotel/restaurants/food service firms is available from FAS Tel-Aviv Office upon request.

Franchising, particularly in the fast-food restaurant sector, has grown since its introduction to the local market in the mid-1980s. The U.S. share of the Israeli fast food franchising market exceeds 50 percent.

U.S. exporters should consider the price sensitiveness of their customers, their product requirements, purchasing policies, and expected purchase volumes. Regarding the Food Standards and Regulations, see Gain Report IS6017:
(<http://www.fas.usda.gov/gainfiles/200607/146208505.pdf>)

After identifying a market opportunity, a U.S. company interested should find an importer, an agent or a wholesaler with experience in the HRI sector. This entity can facilitate custom clearance and advise the exporter on ways of complying with product specific regulations, such as labeling, packaging, import duties, and sanitary regulations. Most food distributors acquire their imported products through an importer or an agent, who are often also distributors with warehouses and transportation means, though there are occasions in which supermarket chains and large HRI chains import directly.

Additional Entry Options:

- Direct marketing (phone/video calls, emails, meetings)
- Direct marketing is common also through mail order booklets.
- Telephone marketing is increasingly common, but with mixed results.
- The Internet is widely used in Israel, and an increasing direct marketing avenue.
- Manufacturing under licensing agreements is also common in Israel.
- The government of Israel encourages both joint ventures and licensing.

Tips from importers on ways to enter the market:

- Most importers seek a brand name that they can develop.
- All importers ask for exclusivity on a brand name for a few years.
- Importers believe that promotion is essential for increased sales; therefore, they usually ask the exporter for a partial investment in a promotion campaign.

Consider participating in FAS Tel Aviv organized or sponsored events. FAS Tel Aviv can assist in participating in ISRAFOOD - An International Food & Beverages Exhibition in Tel Aviv for professionals of the catering and food wholesale, retail, restaurants, hotels, institutional and food shops. During the same time the HOTEX exhibition takes place, presenting food display and restaurant equipment. It is the largest trade exhibition of its kind in Israel. Israfood represents an excellent opportunity to present products to key food importers, distributors, retailers, wholesaler and processors.

See the Exporter Guide Report for additional information:

<http://www.fas.usda.gov/gainfiles/200609/146249051.pdf>

B. Market Structure

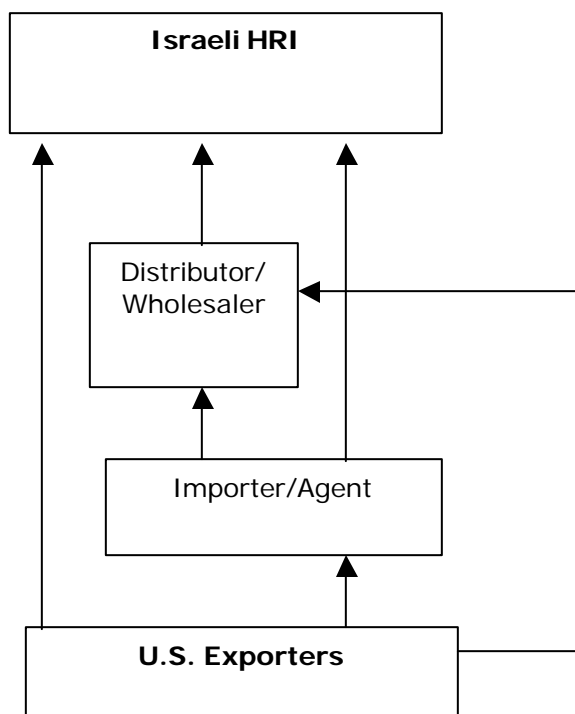
The HRI sector is widely dispersed. Only large chains such as hotel chains or large caterers have a central purchasing office. Owners of small bars, cafeterias and restaurants, that account for the largest number of outlets, purchase food products and ingredients in the local open market or the wholesale market. Most beverages are bought through distributors, a well-organized sector. About 42 percent of the perishable products are obtained from distributors, 22 percent from wholesale markets, and 18 percent from the retail sector. Commercial distributors to the HRI are quite dynamic, capable of supplying most of the needs of the country's small and diverse food service providers.

Many of Israel's food industries, that operate a distribution network, have developed departments specializing in supplying the HRI. In 2001, Tnuva, Osem and Tami-Best Food established a special division that produces and markets to the HRI market. These divisions are respectively, Tnuva-Chef, Nestle Food Service and Cater Plan.

Sales departments of the leading companies visit thousands of HRI establishments weekly or daily in efforts to promote their products.

The food import business is a very dynamic sector in Israel, with over 300 food importers listed by the Tel Aviv-Jaffa Chamber of Commerce. The nationwide list is available from the Federation of Israeli Chambers of Commerce, 84 Hahashmonaim St. Tel Aviv 67011, P.O. Box 20027, Tel Aviv 67011, P.O. Box 20027, Tel Aviv 61200, Israel Tel.: 972-3-563-1010 ; Fax: 972-3-562-3274 ; e-mail: Chamber@tlv-chamber.org.il and on the web at: <http://www.chamber.org.il>.

Raw food materials and food products are imported either directly by the food manufactures, through importers, or agents. Importers and agents sell directly to the food manufactures or via distributors.

Distribution Channel for Imported Food Ingredients:**C. SUB-SECTOR PROFILES****1. Hotels and Tourists**

Tourism is a very important industry to the Israeli economy. Israel is a popular tourist destination, offering a wide variety of tourist accommodations, from luxury hotels in major cities to bed and breakfast inns in smaller communities. The tourism infrastructure is well developed throughout the country and is continuously expanding. However, local tourism is hurt by the security/political situation in the area. Local tourism employs almost 80,000 people, of which 29,000 (37 percent) are in the hotels. Most hotels are located in Eilat, Dead-Sea, Tel-Aviv, Jerusalem and Tiberias.

In 2006, there were 159,501 available beds in Israel (hotels, hostels, rural tourism). In 2006, 1.8 million people visited Israel, a 4.5 percent decrease compared to the previous year. The decrease was as a result of the July-August Lebanon war. In 2006, there were about 19.3 million overnight stays, one percent increase compared to 2005. Out of total overnight stays, tourists made 6.8 million (35 percent) overnight stays, and there were 12.5 million Israeli lodgings. Average tourist stay in 2006 totaled nine days, compared to 11 days in 2000 (the Millenium year) when tourism to the country was at its peak. In 2006, annual hotel-booking rates increased by nearly 2 percent compared to the previous year (from 57 to 58 percent), and the highest booking rates were recorded in the southern part of the country (Eilat and Dead-Sea). It is estimated that 4-5 million tourists will visit Israel by 2009.

Best opportunities for imported food products are during the period of Jewish holidays, Rosh Hashanah (New Year) and Succot (Feast of Tabernacles) – September and October, Chanuka in December and at Passover during April.

Table 5: Revenues, by Hotels, \$ Million

	2005 January-November	2006 January-November
Number of Hotels	334	336
Revenues – total (January-November)	1,063.5	1,164.7
Revenue Per Hotel	3.18	3.47

Source: CBS, Statistical Abstract of Israel

2. Restaurants

In 2006, there were 4,399 food business in Israel, with meat restaurants and coffee shops being the fastest growing sub sectors. The food service industry is expanding and consumers' habits are changing. Over the last few years, Israelis have begun to dine out more frequently and choose premium food when doing so. Israeli consumers spent more than \$2.6 billion on food away from home in 2006. In 2006, it is estimated that approximately 838,000 Israelis visited restaurants per day, spending an average of \$8.7 per meal. Out of total restaurants clients, 18.7 percent choose to eat at a coffee shop, while 28.5 percent prefer to eat fast food and at meat restaurants.

In recent years, Israelis have demonstrated a preference for high-quality beef and seafood when dining at restaurants. Due to the increase in demand for high quality beef and seafood, more high quality beef/seafood restaurants were opened. Households comprise about 70 percent of total fresh beef/seafood consumption, while hotels and restaurants make up the remainder. In 2006, the meat sector's sales were an estimated \$0.52 billion.

The leading hamburger chains in Israel for 2006 were McDonald's with 120 stores, following were the local chain Burger-Ranch with 70 stores, and Burger King with 46 stores. Approximately 1,200 pizza establishments exist in Israel. The pizza sector's sales are estimated at \$94 million per year. The biggest pizza chains are Domino's Pizza (23 stores), Pizza Hut (21 stores), Pizza Meter (13 stores), Sbarro (24 stores), and Pizza Domino (46 stores); combined these account for about 50 percent of all of the sector's sales. There are also many small pizza outlets that compete in this market.

Middle Eastern food is very popular in Israel, especially shawarma, falafel, and Hummus, both served as either a Pita sandwich or in plates in hundreds of small corner shops.

The typical Israeli consumes soft drinks and mineral water during lunchtime, or beer occasionally. In recent years, wine and beer consumption has increased dramatically. Consumption of bottled mineral water is also on the rise.

Table 3: Market Share of Food Business, by Area, 2005 - %

Area	Share
Tel Aviv	36
Jerusalem	10
Haifa	7
Ashdod	7
Tiberias	5
Netanya	3
Ashkalon	3
Bear Sheva	2
Eilat	3
Other	24

Source: Mazon, food journal

Celebration halls are part of this sub sector. There are approximately 900 halls in which 30,000 weddings are celebrated annually, serving around 9 million meals. In addition, approximately 165,000 Bar Mitzvahs and Births (circumcision celebrations) occur, serving 10.8 million meals a year. An average cost per meal is about \$40-\$45.

3. Institutional

There are between 450 to 500 companies in the institutional food service sub-sector, of which eight companies control 50 to 55 percent of the total market. This sector has strong price competition and concentration, with small companies that are often highly specialized in one market niche.

Table 4: Leading Companies in the Institutional Sub-Sector

Company Name	Type of Outlets	Location
Shefa (Foreign Parent Company – Sodexo)	Food for institutional kitchens and airline companies (100,000 meals per day)	National
Tnuva Shef	For hotels and institutional kitchens (sales are estimated at \$165 million per year)	National
Selected	Catering	National
Norkeit	Catering	National
Mevushelet	Prepared meals for companies (20,000 meals per day)	National
Resto (Foreign Parent Company – Compass Group)	Prepared meals	National
Nir Ezion	Prepared meals	National
Moav	Meals to companies	National
L. Eshel	Prepared meals	National
Nadir	Meals to Kibbutz kitchens	National

More than one million meals a day are served in the institutional market; government entities purchase 25-30 percent of the total meals for the IDF, police, hospitals, and schools,

and the rest is served at civilian work places. The average meal is estimated at a cost of \$3-\$4. Thus, this market's annual sales are estimated at US \$740-820 million.

Catering operators buy their raw materials in bulk. When making a selection on products and suppliers, the most important factor is price. The second most important factor is the contribution of the product and supplier to the efficiency of the preparation process. Major changes in the past few years were in the supply of "portion controlled" products, development of dough products, especially frozen, development of ready to use and frozen vegetables, fruits, meats, and poultry. Leaders in this sector complain about lack of sophistication and too few changes. None of the leading caterers import directly.

III. COMPETITION

In 2006, agricultural and food imports to Israel totaled \$2.79 billion, 12 percent above previous year levels. Out of total agricultural and food imports, \$374 million (13.4 percent) were from the United States and \$1.19 billion (42.6 percent) from the EU. In addition, the Far East (\$185 million) and Turkey (\$63 million) are increasing market share.

Domestic and EU suppliers are the main competition for US exporters. The U.S. industry's main advantage lies in the normalization and standardization of regulations for products, reliability in supply, and product's quality. On the other hand, shipping costs, import duties and import licensing requirements are the main barriers to entering the market.

US exporters need to be competitive in their pricing or present products of excellent quality. Israel has a large food production industry of its own. There is also strong price competition among food importers seeking to maintain or enlarge their market share. Nearby EU countries supply sophisticated foods and beverages to the Israeli market, and operate with relatively low transportation costs. On the other hand, U.S. products benefit from tariff rate quotes and preferential customs tariffs. In addition, the current exchange rate between the U.S. dollar and the euro continues to favor U.S. suppliers, as European products become more expensive.

The U.S. food industry has a very positive image in Israel from the aspect of reliability and food safety. At the same time, American foods do not always have a fine cuisine reputation. Likewise, some Israelis believe that Israeli made products are of higher quality and meet better the Israeli taste for food.

IV. BEST PRODUCTS PROSPECTS

Table 5: Major Imports Products Categories and Competitors' Market Share

Product Category	Major Supply Source	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Meat & edible meat offal Net Imports: \$156.8 Million. Live cattle for fattening	1. Argentina –48% 2. Brazil – 27% 3. Uruguay – 13% USA is an insignificant supplier (0%-1%) Live cattle: local herds, Australia, Hungary	the largest frozen beef exporters to Israel are Argentina, Brazil and Uruguay. Imported meat must be kosher. Australia and Hungary are considered BSE free.	Local beef demand is higher than local production. Local cattle fattening has increased significantly during the last decade, driven primarily by imported calves, and the development of an active feedlot industry.
Fish, crustaceans and mollusca Net Imports: \$103.2 Million	1. Norway – 24% 2. Kenya – 13% 3. Argentina– 10% USA is an insignificant supplier (1%-2%)	Largest seafood exporters are Norway (salmon), Kenya (frozen fillets) and Argentina (hake)	Domestic sea food production accounted for 40 percent, while 60 percent is imported
Dairy produce; eggs, natural honey; edible products of animal origin Net Imports: \$31.7 Million	1. U.S. – 21% 2. Germany- 17% 3. Denmark – 15%	U.S. strength is in sorbets, Ice cream, cheddar cheese and natural honey	Israel's strength is in soft cheese. Most of the high quality hard cheese is imported.
Edible fruits and nuts; peel of melons and other citrus fruit Net Imports: \$92.7 Million	1. U.S. – 46% 2. Turkey – 26% 3. China – 5%	U.S. strength is in almond ,walnut, Pears and apples.	Local production of tree nuts is relatively small compared to demand. Local almond production will reach 5,000 tons in 2012, and imports of almonds are estimated to decrease dramatically.
Cereals Net Imports: \$566.1 Million	1. Black Sea Basin 2. Argentina & Brazil 3. U.S. – 20%	The U.S. has been effected by a variety of high quality grain suppliers to Israel and high price gap between U.S. grains and other grains.	Israel is dependent on imports for its grain and feed needs
Oil seeds, grains, fruits, industrial and medical plants. Straw and feed Net Imports: \$280.7 Million	1. Argentina & Brazil 2. U.S. – 21%	The U.S. has been effected by increased imports of soybeans from Argentina and Brazil. U.S. strength is in gluten and corn chips.	Israel is dependent on imports for its grain and feed needs.
Preparations of cereals,	1. Italy – 23%	The U.S. competitors	Osem-Nestle and Elite

flour starch or milk; pastry products Net Imports: \$94.5 Million	2. U.S. – 13% 3. Germany – 12%	are Italian and Turkish pasta and pastry products.	accounts for most of the local production.
Wine & Beer Net Imports: \$28.2 Million	1. Belgium – 23% 2. Netherlands – 15% 3. France – 12% U.S. wine market share is 7 percent. USA is an insignificant supplier of beer (0.5%)	In recent years wine & beer imports have increased significantly, mainly red wines. There is a growing market for specialty beers.	Domestic beer and wine production accounts for 76 percent and 70 percent, respectively, while the remainder is imported.

Source: CBS, Foreign Trade Statistics, Different Years

Sector Trends

A) The HRI recently underwent a process of centralization, and is currently controlled by large corporations, that are competing against each other. B) Multinational companies' involvement (Nestle, Sodexho, Compass, Danone, Unilever, Pepsico and others) are often joint ventures with local investors. C) As a result of household income increases and health food awareness, consumption of healthy food products has increased rapidly in recent years. Therefore, almost 90 percent of Israeli food plants have created new healthy food products or made healthy improvements in their food products.

Section V: Key Contacts

U.S. Mailing Address: For packages and mail: AGRICULTURE UNIT 7228 BOX 3 APO AE 09830 Packages can weigh no more than 70 pounds and must not be larger than 108 inch. Anything larger will be subject to a tariff.

Local Mailing address: Contact the Office of Agricultural Affairs in the U.S. Embassy in Tel Aviv. Contact: Tel: 972-3-5197588/7324, Fax: 972-3-5102565,
E-mail: gilad.shachar@usda.gov, yossi.barak@usda.gov,
Web Site: www.usembassy-israel.org.il/fas/

The Food Industries Association, Manufactures' Association of Israel

29 Hamered St. Tel Aviv, 68125
Contact: Mr. Meir Bar-El, Deputy General Manager,
Tel: +972-3-519-8846/47
Web site: <http://www.industry.org.il/Eng/SubIndex.asp?CategoryID=114>

Food Control Service - Ministry of Health

12 Ha'arba'a St.
64739, Tel Aviv
Contact: Ms. Raya Boyarski, Food Import Licensing Officer,
Tel: +972-3-627-0103
Fax: 972-3-561-9549

Web site: <http://www.health.gov.il/english/>

Israel Hotel Association

29 Hamered St. P.O. Box 50066 , Tel- Aviv 61500

Tel. 972-3-5170131 , Fax. 972-3-5100197

Web site: <http://www.israelhotels.org.il>

Israeli Veterinary Services- Ministry of Agriculture.

P.O. Box 12

50250, Bet Dagan

Contact: Dr. Roni Ozari, Export/Import Officer

Tel: +972-3-968-1649

Fax: 972-3-960-5194

Web Site: <http://www.vetserverg.moag.gov.il/vetserverg>

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42 H. Levanon St

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